

**STANDING RULES OF THE SHEPARDSON
PARENT-TEACHER ORGANIZATION (PTO)**

1. **Procedure:** The Standing Rules of this organization may be changed by a majority vote of the Board of Directors at which there is a quorum; and may be amended, rescinded or suspended by a vote of the Board without notice. The PTO members shall be notified of changes in the Standing Rules.

2. **General Policies**
 - a. It is expected that all PTO Board of Directors and committee Chairperson(s) are familiar with the Bylaws and Standing Rules.
 - b. These Standing Rules and Bylaws shall be formally reviewed by the Board of Directors at least every three years to determine if changes should be implemented.

3. **Gift Policy:** The officers of the PTO may, from time to time, send an expression of sympathy or appreciation, the cost of which should not exceed \$20.00. All such arrangements should be discussed in advance, preferably with the entire Board of Directors, but certainly with the Elected Officers, and plans should be discussed for presentation of such gifts. Keeping in mind this organization's purpose statement, objectives and the 501(c) (3) tax-exempt status. Cash or cash equivalents (including gift cards) may not be used as they are considered compensation under IRS regulations.

4. **Compensation:** No Board of Director(s) shall receive compensation for any services rendered. However, any director may be reimbursed for actual expenses incurred in the performance of his/her duties.

5. **Sponsorship of Other Clubs, Organizations, or Individuals:**
 - a. The PTO shall sponsor and promote other clubs and teams that are consistent with our objectives. Examples may include, but are not limited to, Odyssey of the Mind, Helping Hands, and Lego Robotics.
 - b. The PTO shall not contribute funds to any political campaign, nor shall it endorse any political candidate.

6. **Collections:** For all debts owed to the PTO, including returned checks and declined credit cards, the Treasurer and fundraising committee chair will follow this general process outline. The collection process is only meant as a guideline. Its purpose is to promote consistent treatment of all individuals.
 - a. The current bank charge for a returned check will be included in the amount owed.
 - b. The fundraising chair or Treasurer will make a phone call when possible or send a letter providing notice of a debt owed with a request for payment within 15 days.
 - c. If payment has not been received within 15 days, send a follow up letter with another request for payment within 15 days.
 - d. After approximately 30 days of attempted collection, and depending on the response from the debtor and/or any new information learned, the Treasurer may:
 - i. Send another letter.
 - ii. Enlist the assistance of another Board of Director or the school in contacting the individual.

- iii. Deposit the check again. Normally, NSF checks may be re-deposited up to two (2) times.
 - iv. Turn the debt over to a debt collection agency as determined by the board.
 - v. Declare the debt uncollectable.
- e. Collections will be handled with discretion. Generally, only the Treasurer and fundraising chair will know the names of people with outstanding debts. When collection efforts have been unsuccessful, the names may be shared with the other board members, office personnel, and the fundraising or activity chairs to prevent further losses.
- f. PTO has no responsibility to deliver merchandise that has not been paid for, and will make every attempt to minimize losses.
7. **Returned Check Policy:** Until the PTO is reimbursed for the original amount plus expenses; checks from the affected person will no longer be an acceptable form of payment for other fundraisers or PTO sponsored activities. Alternate forms of payment must be used instead of check payment (cash or money-order). Any person that has uncollected debt must use an alternate form of payment for all future PTO sponsored activities.
8. **Declined Credit Card Policy:** If a credit card is declined, the PTO collection policy will be followed and alternative forms of payment must be used instead of credit card payments (cash or money-order). Any person that has uncollected credit card charges must use an alternate form of payment (cash or money-order) for all future PTO sponsored activities.
9. **Reserve Policy:** The PTO Board shall propose and obtain approval, through a majority vote, to have a reserve account for the sole purpose of saving for a specific program or to make a specific purchase that supports the mission and objectives of this organization in accordance with 501(c) (3)-tax law. Keeping in mind that the non-profit status of the PTO requires all money raised to be spent on the students, and not saved without a specific purpose, the PTO's reserve assets may be invested in an effort to achieve the following prioritized objectives:
- a. The preservation of the principal funds.
 - b. Structure maturities to ensure that assets will be liquid for anticipated needs.
 - c. Achieve long-term investment performance appropriate for the asset classes selected.
10. **Liability Insurance:** It is recommended that the PTO purchase liability insurance for all officers and directors/committee chairs.
11. **Appointed Committees Descriptions:** Events may or may not be happening during a school year depending on school calendar and Board of Directors decisions. All committees should have a folder/notebook that contains the event notes, thoughts, budget, etc. from the current year as well as previous years if it applies. It is the chair and/or committees' responsibility to maintain the folder/notebook to keep it up to date and then supply it to the next chair. The goal of this is to help reduce chair/committee stress about how an event works, gives continuity to the event and to ease transition.

a. Social Events:

- i. **Ice Cream Social: (Fall):** This activity may be held out by the garden area at the back of the school, it's a time to socialize and have fun with fellow Shepardson friends and families.
 1. Chair and/or committee is responsible for purchasing and/or soliciting donations for event food.
 2. Chair and/or committee works to advertise the event to the school families, teachers and staff.
 3. Chair and/or committee works to secure volunteers for the event if needed.

- ii. **Winter Social (December):** Fun indoor winter family activities chosen by a committee, past years have included listening to the school choir and eating cookies. (Varies from year to year)
 1. Chair and/or committee work to select the activities the families will do during the event. They also collect/purchase the needed supplies.
 2. Chair and/or committee works advertise the social to the school and its families.

- iii. **Sock Hop (April):** A fun family friendly event that can include, but doesn't have to, involve dressing up in poodle skirts, jeans and white t-shirts and if you have one even a letter jacket.
 1. Chair and/or committee work to solicit donations any supplies they might need. Past years have included root beer floats.
 2. Chair and/or committee works advertise the social to the school and its families. (A parent must accompany their child/ren the entire time)

- iv. **Movie Nights (dates varies):** Family friendly movies are shown on select Friday nights in the school gym. Families may bring blankets, pillows, and chairs to help with the comfy gym floor.
 1. Chair and/or committee work to select the movies that will be shown the night of the event.
 2. Chair and/or committee works advertise the social to the school and its families. (A parent must accompany their child/ren the entire time)

b. All Fundraising Events: (These are brief descriptions and certain positions might have additional responsibilities.)

- i. **ABC Fundraising (Fall):** This fundraiser allows students to bring home a catalog with filled various products available to sell, instructions accompany information. Shepardson PTO earns a portion of the sales.
 1. Chair works with ABC Fundraiser and Principal to select assembly date.
 2. Chair and/or committee works advertise the fundraiser to the school and its families.
 3. Chair and/or committee works to distribute sales packets at the beginning of the sale and then collect them at the end.
 4. Chair works to tally money and orders and turn it in per Article VIII Finances, Section 7. Money Handling Policies in the PTO Bylaws
 5. Chair works with ABC Fundraiser to submit orders and then distribute products.

- ii. **Family Nights (Specific dates throughout the school year):** The Family Night Chair is responsible for partnering with local restaurants that will in turn donate a portion of the proceeds back to Shepardson STEM PTO. The money raised will be used as part of the PTO budget.
 - 1. Chair will also be responsible for advertising to the school and community when the event is planned.
 - 2. Chair will work the restaurants to secure the checks from the evenings to turn in per Article VIII Finances, Section 7. Money Handling Policies in the PTO Bylaws

- iii. **Read-a-Thon (October):** In the beginning of October students receive an informational packet about the fundraiser and work on a goal set by the Read-a-Thon committee. Then students have the opportunity to fundraise by collecting money that 100% comes back to Shepardson PTO. The big finish to the fundraiser is students get to dress up as a storybook character on Halloween or the closest date to it for the parade and day of reading fun.
 - 1. Chair and committee work to plan what the monthly reading goal is for students to work on (hours, minutes, books, etc.)
 - 2. Chair and/or committee works to advertise the fundraiser to the school and its families.
 - 3. Chair and/or committee works to collect donations to be used as prizes at end of the fundraiser to the students the committee deems have won.
 - 4. Chair and/or committee works to distribute sales packets at the beginning of the sale and then collect them at the end.
 - 5. Chair and/or committee recruit volunteers to help with any jobs needed to help with job prior to the day, and the day of the event.
 - 6. Chair, committee, volunteers work to tally money per "COUNTING READ-A-THON ENVELOPES" guidelines.
 - 7. Chair to reference Article VIII Finances, Section 7. Money Handling Policies in the PTO Bylaws on how to handle the money collected and if a check is needed from the PTO.

- iv. **STEM Night Dinner** (Coordinates with school's STEM Night): Held during the school's STEM night to give families who have pre-purchased dinner a chance to eat.
 - 1. Chair and/or committee works to coordinate with a local business to set-up a dinner that school families can pre-purchase.
 - 2. Dinner information to be sent home via e-mail and Friday Folders prior to event.
 - 3. Chair and/or committee work the night of the event to connect families with the food they have ordered.
 - 4. Chair to reference Article VIII Finances, Section 7. Money Handling Policies in the PTO Bylaws on how to handle the money collected and if a check is needed from the PTO.

- v. **Scholastic Book Fair (Date Varies):** This is a chance that the PTO gives families, teachers and staff to buy books and other products from Scholastic, with a portion of the proceeds coming back to the school in the form of Scholastic Dollars.
 - 1. Chair coordinates with Scholastic representatives to plan annual book fair.
 - 2. Chair and/or committee recruiting volunteers to set-up, act as cashiers during, and take down fair.
 - 3. Chair will also be responsible for nightly deposits to the PTO treasurer and financial reporting to Scholastic once the fair has closed.

- vi. **Trivia Night (January):** This is an adult only event! It's a chance to get your friends together, have dinner, try to answer trivia questions and partake in the live and silent auctions. 100% of the money comes back to Shepardson.
 - 1. Trivia Night Chair manages a committee of volunteers to pull together all aspects of trivia night fundraiser such as venue communication, keeping a budget, event decorations, desserts, 50/50 game, auction items collection, trivia questions, A/V needs, and teacher moments. There are many components to the event, and the coordinator is in charge of making sure everything goes smoothly.
 - 2. Chair works with the Treasurer to coordinate money collected the night of the event.

- vii. **Box Tops for Education Fundraiser (Held twice a school year):**
 - 1. The fundraiser is held as friendly class competitions with the class who turns in the most points winning a PTO sponsored pizza party. Box Tops are clipped and turned in for 10¢ a piece – all of the money raised goes to the school to be put towards field trips, class supplies, and STEM supplies. This is an easy way to earn extra money & supplies for our school with very little commitment from families.
 - 2. The first is held in the fall and second is held late winter/early spring, The chair sets with dates with the President.
 - 3. Chair and/or committee works advertise the fundraiser to the school and its families.
 - 4. Chair and/or committee verify all Box Tops are submitted are useable.
 - 5. Chairs works with the Box Top for Education company to get labels submitted and receive a check.

- viii. **King Soopers Neighborhood Grocery Card (Held throughout the school year):** This is a chance for families to raise money for the school just by shopping and getting gas at King Soopers and/or its affiliate stores and gas stations. Card holders can still get credit card points when putting money on the neighborhood grocery cards. Shepardson then gets money when the neighborhood grocery cards are used as payment.
 - 1. Chair and/or committee works to advertise the fundraiser to the school and its families.
 - 2. Chair and/or committee is responsible for working with Treasurer and King Soopers to get the cards to have on hand, track cards being handed out and being used.
 - 3. Chair and/or committee is responsible for getting the cards to the families.
 - 4. Chair is responsible for tracking checks received from King Soopers and turning them into the Treasurer following the Article VIII Finances, Section 7. Money Handling Policies in the PTO Bylaws on how to handle the money collected and if a check is needed from the PTO.

- c. **Community Building Committees Descriptions:**
 - i. **School Directory (Fall):** This position is responsible for collecting, designing, printing, sending out paper copy directories filled with PTO information, school information, and school families.

1. Chair and/or committee is responsible for sending data collection out via online Google Doc form, paper forms, etc to gather the school families' information that would like to submit into the printed directory.
 2. Chair and/or committee is responsible for working with PTO Board of Directors to determine if there will be a cost associated with the directories that is passed onto the families. If so, Chair duty is to collect, track and turn in money following Article VIII Finances, Section 7. Money Handling Policies in the PTO Bylaws on how to handle the money collected and if a check is needed from the PTO.
- ii. **Yearbook (Year-long):** Take photographs at school and at special events, collect pictures from parents and teachers, work with the school photographer and yearbook publisher, coordinate an all-school picture, a faculty and staff picture, and a fifth grade picture for the yearbook in the Fall or the Spring (depending on the weather that year), take a class picture of each class, create the yearbook, advertise the yearbook, distribute yearbook order forms and/or create an online order website, collect orders and money, keep a detailed list of orders, order 25 extra yearbooks on average for anyone who forgot to place an order, and distribute the yearbooks to each classroom teacher at the end of the school year.
1. Chair is to collect, track and turn in money following Article VIII Finances, Section 7. Money Handling Policies in the PTO Bylaws on how to handle the money collected and if a check is needed from the PTO.

iii. **Teacher Appreciation/Classified Brunch**

1. **Classified Brunch (Fall):** This is a chance for the parents to say thank you to all of our wonderful paraprofessionals and office staff by donating food to the organized brunch.
 - a. Chair works to solicit donations/food from school families through e-mail sign-ups.
 - b. Chair sets-up and cleans up the day of the brunch.
2. **Teacher Appreciation BBQ (May):** A great chance to say thank you to the teachers and staff at the end of the year with a BBQ. Parents are asked to sign-up to provide a dish or help with prizes/gifts for all of the wonderful teachers, staff and administration.
 - a. Chair works to solicit donations for teacher giveaways and food from school families through e-mail sign-ups.
 - b. Chair sets-up and cleans up the day of the BBQ.

iv. **Head Room Parent Coordinator**

1. In the fall the Head Room Parent Coordinator is responsible for finding at least one room parent for each classroom, assisting in any way possible when a teacher is having difficulty finding one for their classroom, and then helping each room parent understand their role and help them to get started for the school year. This is typically done by contacting each teacher before the school year has begun to help them find volunteers, usually with a signup opportunity or something similar at the open house or first week of school.

2. Once each classroom has a room parent the Head Room Parent Coordinator will organize an information meeting, usually around the middle of September, with all the volunteers to go over the basics of the role. Those include budgeting for the year, finding additional volunteers, class party specifics such as dates, times and planning ideas, as well as any other additional information such as classroom gifts and teacher appreciation week.
3. The Head Room Parent Coordinator will also work with the school administration to set and maintain any specifics for room parent volunteers like party times and rules.
4. The Head Room Parent Coordinator will make a roster of room parents and be available to help each room parent, teacher and the administration as necessary throughout the year.

v. New Family/Hospitality Coordinator

1. New Parent Social (Fall) – An opportunity to be welcomed for new families to Shepardson and a chance to meet other families.
 - a. Coordinator works to set-up small coffee and food table for families.
 - b. Coordinator works to advertise the event to all families that they are welcome.
2. Coordinator works with office staff to gather names of new families that join Shepardson throughout the year.
 - a. Coordinator contacts/sends home PTO and school information packets and possibly a school directory if there are extras.

vi. SchoolKidz Coordinator (School Supply Kits) (September – September Position)

1. Coordinator works with teachers to gather written class supply lists for the following school year.
2. Coordinator works with the company, SchoolKidz, to upload the supply lists, verify for accuracy, and communicate with Shepardson parents for ordering in the Spring for delivery in the Fall.
3. In August, this person coordinates the distribution of box kits to families.
4. Coordinator also works with the PTO Board of Directors and the school Principal in the Fall to determine if a new contract will be signed for the following school year to ensure the largest discount possible.
5. Coordinator works with the school office to help them generate the generic school lists that are used for local commercial retailers. It is the school's duty to maintain those lists.

vii. Website Coordinator

1. Coordinator works with the President, Secretary, Treasurer and all chairs throughout the year to keep the PTO's website up to date.
2. Coordinator works with the President and Treasurer for Pay-Pal items.